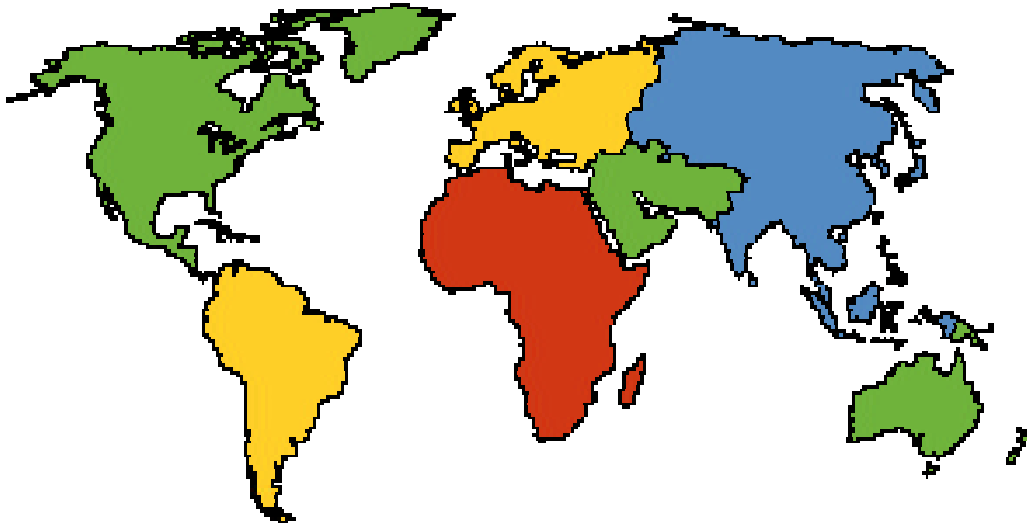


International Tourism



Utah!

A Closer Look at an Emerging Travel Segment

Utah Division of Travel Development
Department of Community and Economic Development
January 2001

INTRODUCTION

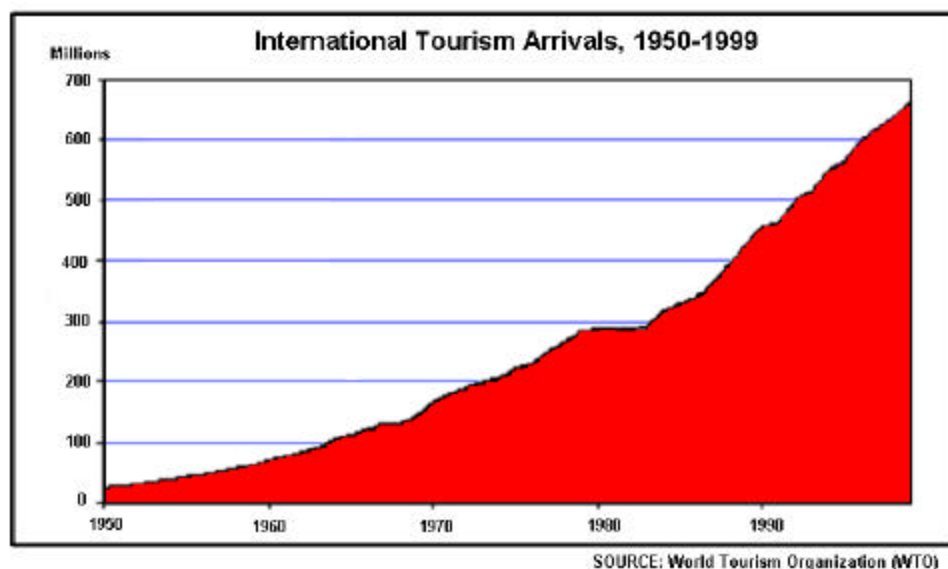
Visit some of Utah's most popular attractions lately and you will encounter a wide variety of people and cultures. Listen closely to conversations going on around you and you will likely here a mixture of several different languages: German, French, Japanese, Italian, Spanish, Dutch, perhaps even some strangely accented English via Australia or the United Kingdom. Fulfillment requests for the Utah travel guide in 2000 recorded inquiries from almost 90 countries worldwide, including requests from such far away places as Kazakhstan and Namibia. A visit to the Utah.com website provides Utah travel information in six languages, catering to potential visitors from around the globe.

Increasing globalization, growth in many economies worldwide and the abundance of information available about vacation destinations has mobilized travelers around the globe and motivated them to look for new and unique experiences. Distance has become less of a barrier as increased air capacity and flights to and from a greater number of cities have opened up new markets and allowed more people to travel beyond their own borders.

The international visitor currently represents a small but important travel segment in Utah's travel and tourism industry, with nearly 5% of total visitors arriving from a country besides the United States. Utah is positioned to emerge on the global scene as a result of international media exposure from Salt Lake City's hosting of the 2002 Olympic Winter Games. To maximize the growth potential of the international visitor travel segment, it is important to understand the current dynamics of the international traveler to Utah, including Utah's positioning as an international destination, international visitor characteristics and travel patterns and individual market strengths and weaknesses.

TRENDS IN GLOBAL TRAVEL & TOURISM

The global travel and tourism industry has grown at a remarkable pace throughout the last half of the twentieth century, from a mere 25 million international arrivals worldwide in 1950 to 657 million in 1999. Growth accelerated significantly over the past fifteen years. Since 1950, international tourist arrivals have increased at an annual rate of 7%. Even more significant is the growth in tourism spending, which has grown at an average annual rate of 12%.



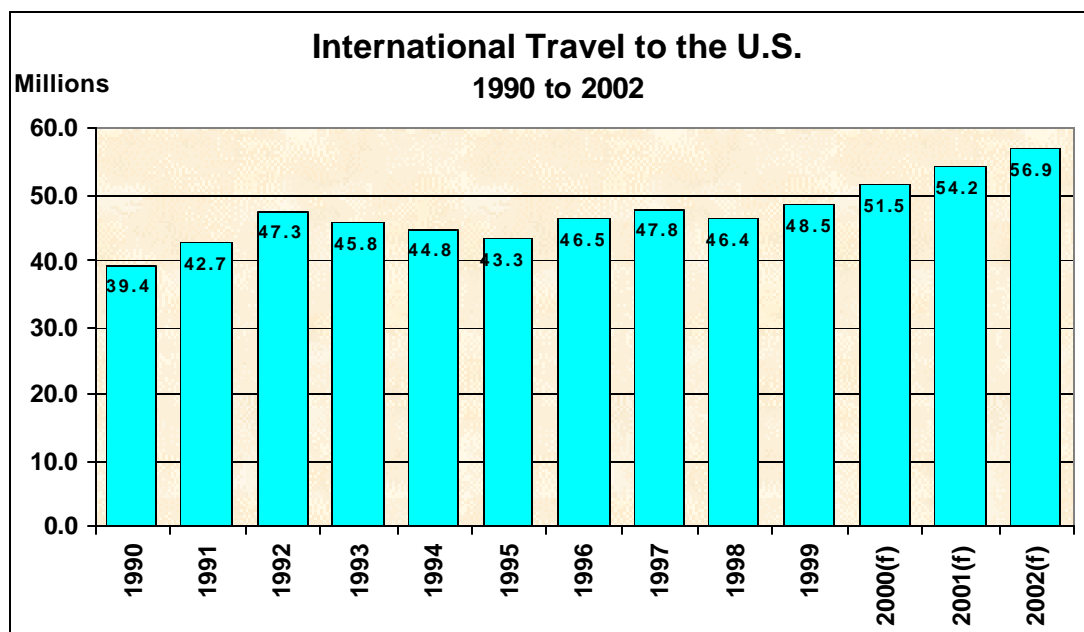
The World Tourism Organization estimates that tourism ranks among the top five export categories for 83% of all countries. A recent report released by WEFA economic consultants and the World Travel and Tourism Council summarized the economic impact of the global travel and tourism industry for 1999. Some of the highlights include:

- Spending by international visitors generated \$3.5 trillion and accounted for 11.7% of the world's GDP. Almost 200 million jobs (8% of all jobs worldwide) were supported by the travel and tourism industry.
- Spending by international travelers accounted for 8% of world exports with additional impacts due to exports of travel and tourism's indirect and induced goods and services.
- Travel and tourism related GDP is forecasted to increase by 3.0% per year in real terms and will support the creation of over 5.5 million jobs per year over the next decade.

In addition to the strong overall expansion of the industry, tourism has also become much more diverse. Trips are spread throughout the year to a myriad of potential destinations and are customized according to individual tastes and preferences. The leisure sector has seen strong growth in the segments of cultural travel, sports and adventure tourism, rural tourism, nature-based travel, cruises and all kinds of combinations.

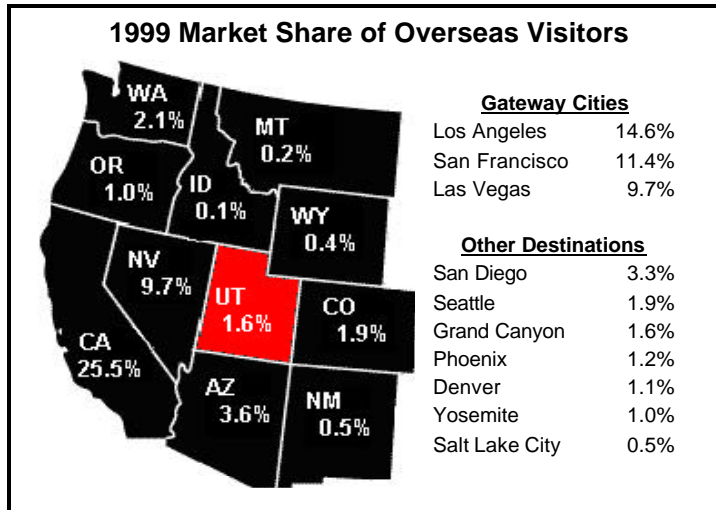
INTERNATIONAL TRAVEL TO THE U.S.

According to the U.S Department of Commerce, international travel in the U.S. represented nearly 50 million arrivals in 1999 and generated \$75 billion in traveler spending. Canada's stronger economy, a recovering Asia, and Western Europe's relatively steady economic growth all played a major role in the stronger than expected 5% growth in 1999 arrivals to the United States. According to the World Tourism Organization, the U.S. posted one of the highest growth rates among the top visited countries in 1999.



SOURCE: TI/ITA, U.S. Dept. of Commerce

The top international markets for the U.S. during 1999 were Canada, Mexico, Japan, the United Kingdom, Germany and France, each recording more than one million visitors to the U.S. Predictably, most international visitation occurs at major urban centers or “gateways” within the U.S., notably, New York, Los Angeles, Miami, Orlando, San Francisco, Las Vegas, Washington D.C., Chicago and Boston. However, once the international visitor arrives to the gateway city, many travel to other destinations. Thus many non-gateway destinations still attract a significant number of international visitors.



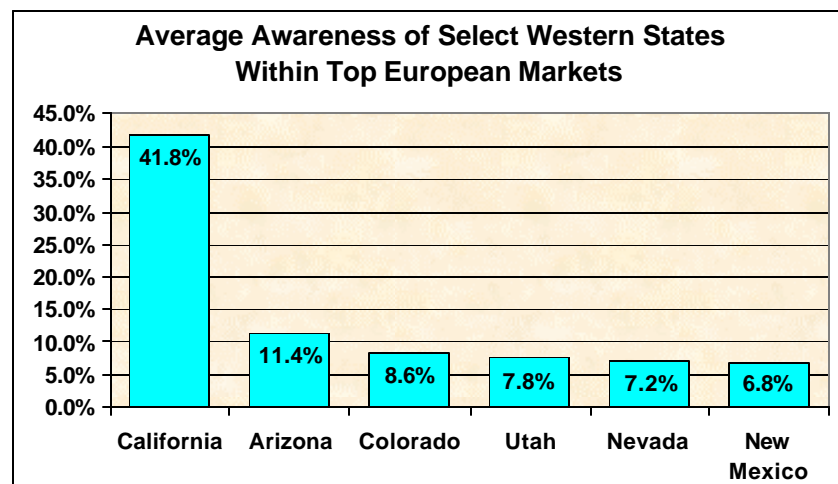
Top Ten Overseas Markets

Rank	United States	Utah
1	Japan	Germany
2	U.K.	France
3	Germany	U.K.
4	France	Japan
5	Brazil	Netherlands
6	Italy	Italy
7	Venezuela	Switzerland
8	Netherlands	Australia
9	Argentina	Belgium
10	South Korea	South Korea

SOURCE: T/I/TA, U.S. Dept. of Commerce

The average international visitor to the U.S. in 1999 stayed 15.2 nights within the country and visited 1.6 states or 2.1 specific destinations. Within the western United States, Los Angeles, San Francisco and Las Vegas are the major gateway cities. Other major western cities such as San Diego, Seattle, Phoenix, Denver and Salt Lake City attract smaller numbers of travelers. Well-known national parks such as Grand Canyon and Yosemite are also major attractions. Other parks, such as Yellowstone, Bryce Canyon and Zion attract smaller numbers of international visitors.

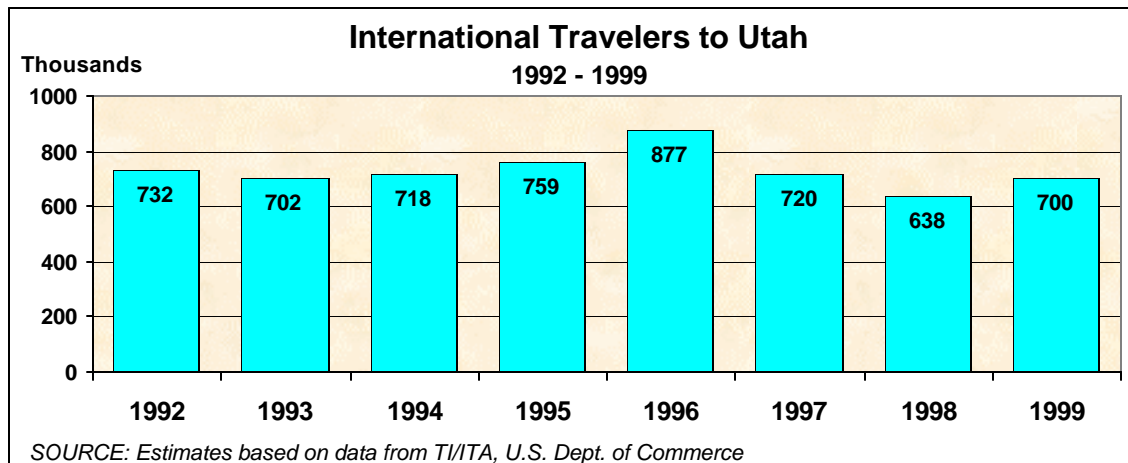
Visitation to a destination is usually positively correlated to awareness. A destination with a strong identity and a well-known image is more likely to receive attention from international travelers. Within the U.S., awareness varies greatly. Some states such as California have a high level of awareness both for the state as well as for destinations within the state. Other states such as Nevada are better known for a destination (Las Vegas) as opposed to the state as a whole. The challenge to Utah and other lesser-known destinations is to overcome barriers of awareness. Research has suggested several possible strategies to overcome such barriers such as referencing the nearest well-known gateway city in advertising and promotion or providing a user-friendly choice of itineraries and/or packages via the Internet or other collateral materials.



SOURCE: Utah Image and Awareness Survey, 1999 European Study

INTERNATIONAL TRAVEL TO UTAH

International travel to Utah is expected to be one of the fastest growing traveler segments over the next several years. In general, international travelers are sensitive to the economic conditions in their home country. International travel to Utah was significantly impacted by the Asian economic crisis and the repercussions that impacted other nations' economies worldwide. Arrivals from almost every region declined in 1997 and 1998. As economic conditions improved, so did the number of international visitors, rebounding significantly in 1999 to nearly 700,000 international visitors. While 1999's performance still lags behind the strong performance of the mid-1990s, solid economic fundamentals and expanded marketing opportunities should propel growth in the international travel segment for the next several years.



The international travel market is an important travel segment for Utah not only as a result of its tremendous growth potential. In addition, international travelers are typically more affluent, stay longer and are more likely to participate in spending activities than their U.S. counterparts.

Domestic vs. Overseas Travelers		
Traveler Characteristic	U.S. Travelers	Overseas Travelers
Household Income	\$58,300	\$72,800
Avg. Per-Day Spending	\$87	\$81*
Avg. Length of Stay	3.6 Nights	5.7 Nights
Purpose of Trip	80% Leisure	81% Leisure
Avg. Travel Party Size	2.7 Persons	1.9 Persons
Party Composition	68% Adults Only	90% Adults Only
Accommodations	50% Hotels/Motels	76% Hotels/Motels
Leisure Activities	19% Nat'l./State Parks	78% Nat'l./State Parks

** Per-day spending figures are greatly influenced by the exchange rate*

SOURCE: Domestic - D.K. Shifflet & Associates, Ltd. DIRECTIONS® data

International - U.S. Department of Commerce, Tourism Industries, 1997-99 Analysis

Through the decade of the 1990s, characteristics of international travelers to Utah have changed significantly. Most of the changes reflect some of the dynamic influences within the travel industry – demographics, technology and economics.

Demographics. The majority of Utah's international markets are experiencing the same demographic trend that is also affecting the United States – the aging of the baby boomer

population group and their subsequent transition from full-time employment to more recreational or other leisure opportunities. The average age of an international traveler to Utah has increased from 39 in 1993 to 42 in 1999. Older travelers are more likely to have the financial means and necessary time to travel abroad. *Another result of this demographic trend is the increasing number of frequent international travelers.* From 1993 to 1999, the percentage of travelers making their first international trip declined from 39% to 32%.

Technology. The rise of the Internet has revolutionized both the acquisition of information and travel planning. With only a few clicks of the mouse, a traveler from nearly anywhere in the world can access information ranging from the weather to local dining suggestions to available hotel accommodations. Roper Reports Worldwide recently released a global survey of computer and Internet usage that reported that an estimated 30% of global consumers owned a personal computer. Over half of those with PCs (18%) went online at least once in the last month. Internet penetration rates are rapidly rising in most of Utah's international markets. A separate survey conducted in

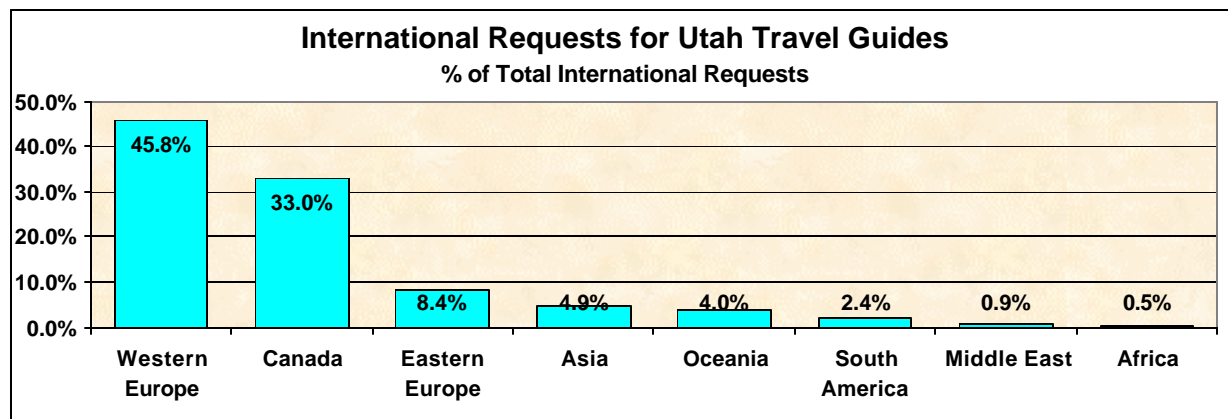
Region	PC Ownership	Internet Penetration
Developed Asia	55%	32%
North America	51%	41%
Western Europe	39%	23%
Latin America	29%	11%

SOURCE: Roper Research, as reported by eMarketer, 2000

Europe by Pro Active International identified Internet penetration rates from 65% in Sweden to 12% in Spain. Utah's top European markets fell in between, with penetration rates in Switzerland, the Netherlands and the U.K. approaching 50%. Germany, France and Italy reported between 30 and 35% penetration rates. While actual penetration rates vary according to different reports, the fact that they are rising in virtually every country worldwide is undisputed. Developing technology such as wireless communications will open additional markets that are lagging behind due to a lack of telecommunications infrastructure.

The increasing availability of personal computers and the Internet has afforded travelers with an additional source from which to gather information regarding a vacation destination. The advantages of the Internet are its convenience and personalization capabilities. Trends indicate that it is rapidly becoming a vital part of vacation planning everywhere. Notwithstanding the influence of the Internet, travel agencies, travel guides and friends and family remain the top sources of information for international travel.

Roughly 10% of Utah Travel Guide requests originated from international sources during the first three quarters of 2000. Western Europe, led by Germany, the U.K. and the Benelux countries accounted for 46% of the total. Canada, representing Utah's single largest international market, accounted for a third of all international travel guide requests. Eastern



SOURCE: Utah Travel Council, Jan. - Sept. 2000

Europe, led by Russia and Ukraine, posted a surprising number of information requests. The Asian markets are likely under-represented in this sampling because Japan has its own travel guide distribution network that is not considered in the totals. The 90+ countries that are represented by travel guide requests is significant given the absence of consumer international marketing or direct marketing initiatives by the Utah Travel Council. *The diversity in requests reflects the ease of information transactions in the modern economy.* Even without an international marketing presence, the Utah Travel Guide was disseminated in all regions of the world. Even in remote and developing markets such as Eastern Europe, South America, the Middle East and Africa, technology has arrived and is beginning to breakdown traditional information barriers.

With the wealth of information available to travelers, personalization has become an important facet of planning vacation itineraries. The impacts of such personalization are evidenced in the wide variety of activities international visitors engage in compared to just a few years ago. Although national parks, shopping, sightseeing in cities and dining continue to be overwhelming favorites, the increasing interest in small towns, cultural and heritage attractions and nature-based travel indicates the individual tastes and preferences of travelers.

Economics. Real income growth and a strong economy are the most important indicators for whether or not international travel will increase or decrease from a given country. According to major economic forecasting organizations like the International Monetary Fund (IMF), OECD, Eurostat and WEFA, world economic prospects for the next few years are encouraging. For example, WEFA forecasts economic growth in most of Utah's major international markets, including Germany, the United Kingdom, France, Japan and Italy. Growth is forecasted to slow somewhat in Canada, but travel should increase as the unfavorable U.S.-Canadian exchange rate improves. *Another factor influencing international travel is the exchange rate.* The relative strength of the U.S. dollar in recent years has prompted some travelers to choose other destinations or alter their spending patterns while traveling in order to avoid the costly impacts of an unfavorable exchange rate.

International Economic Conditions 2001-2002						
Country	2001 (Percent Change)			2002 (Percent Change)		
	Real GDP	Inflation	Unemp. Rate	Real GDP	Inflation	Unemp. Rate
United States	3.6	2.5	4.3	3.4	2.4	4.4
Canada	3.2	2.2	6.6	3.0	1.9	6.5
Germany	3.3	1.6	9.2	2.6	1.8	8.6
France	3.2	1.3	8.9	2.6	1.6	8.4
United Kingdom	2.6	2.6	3.6	2.6	1.6	3.7
Japan	3.1	0.7	4.4	3.1	1.1	3.9
Italy	2.8	1.6	10.3	2.4	1.9	9.7

SOURCE: WEFA, Inc.

PROFILE OF UTAH'S OVERSEAS VISITORS – A STORY OF TWO VISITORS

A profile of overseas visitors to Utah was conducted on behalf of the Utah Travel Council by CIC Research, Inc. using In-Flight Survey Data from ITA Tourism Industries. The profile reflects information gathered from January through December 1997-1999. *The analysis does not include visitors from either Canada or Mexico.* The data revealed two major types of overseas travelers to Utah who were very different in terms of demographic characteristics, travel patterns and purposes and activities.

The groups are identified as visitors to Utah's National Parks (40%) and visitors to Salt Lake City, or the business and ski visitor (32%). Each visitor group has a very different visitor profile.

The state's complete profile is more accurately the combination of these two different groups. Each of the three overseas visitor groups (overall, national park and Salt Lake City) is presented in some detail below. A special analysis is also included on the Las Vegas visitor because of the increasing relevance of that growing market to Utah.

Utah's top overseas markets are located in Western Europe and Japan. Germany (23%), France (16%), the United Kingdom (11%), the Benelux countries (10%), Japan (8%) and Italy (6%) represent Utah's top markets. Given existing trends and forecasted growth in international tourism from many regions of the world, Utah anticipates eventual growth in arrivals from several emerging markets, including countries in South America (Brazil and Argentina), Scandinavia, Asia (Korea and Taiwan), Mexico and Australia.

Demographics

- The average age of the overseas visitor to Utah is 42, with nearly 50% of all visitors in the 35-54 age grouping.
- The large majority travel with a spouse (37%) or with other family members (34%). Fewer travel alone (21%) or with friends (15%). However, *90% of all overseas visitors are adults, in contrast to the family-dominated domestic travel market.*
- Over two-thirds of all overseas visitors are men (68%), although since one in five overseas visitors is on a business-related trip, the higher percentage of male visitors is not unexpected.
- Over 22% of all overseas visitors boast annual household incomes of greater than \$100,000. The average household income is \$72,800.

Travel Patterns

- *Roughly two-thirds of overseas visitors to Utah (68%) are repeat visitors to the U.S.*
- The majority of overseas travelers to Utah enter the country through Los Angeles (26%), San Francisco (15%) and New York (10%). Other common ports of entry include Chicago (8%), Detroit (4%), Cincinnati (4%), Washington D.C. (4%) and Atlanta (3%).
- Once in the U.S., most overseas travelers prefer to travel in rental vehicles (58%). Many also take advantage of domestic air transportation (40%).
- The average stay within the U.S. is 23.5 nights, while the Utah portion of the trip averages 5.7 nights.¹
- On average, the overseas visitor will visit 3.8 states and 5.3 specific destinations while on their trip to the U.S. Besides Utah, other common destinations include California (San Francisco, Los Angeles, Yosemite and San Diego), Nevada (Las Vegas), Arizona (Grand Canyon, Phoenix), Colorado and Wyoming (Yellowstone).
- Within the state, Salt Lake City is visited by nearly a third of all overseas visitors (32%). Other commonly visited destinations include Bryce Canyon National Park (25%), Zion National Park (13%), Monument Valley Navajo Tribal Park (12%) and Glen Canyon National Recreation Area (5%).
- Over three-fourths (76%) of overseas travelers stay in hotels or motels with the remainder split between private homes and camping.
- The average overseas visitor spends \$81 per day.

¹ While the average stay in the U.S. is 23.5 nights, there is a significant difference between Western European visitors and Japanese visitors. The Japanese visitor spends 12.7 nights in the U.S. as opposed to the 18-25 nights spent in the U.S. by European travelers. In relative terms, the Japanese visitor dedicates a greater portion of his/her trip to Utah.

- On average, the trip decision is made approximately four months in advance (120 days), with air reservations and other arrangements made closer to the departure dates.
- The most common sources of information include travel agencies (65%), travel guides (25%), friends and relatives (24%), state or city travel offices (15%), personal computers (12%) and airlines (11%).
- Only 30% of overseas travelers indicated they had purchased a vacation package, with the most frequent type of package including air and lodging. Other common packages include guided tours or air and car rentals.

Travel Purposes and Activities

- The majority of overseas travelers to Utah arrive for leisure purposes (81%), including 10% who arrive to visit friends and relatives. The remaining 19% is comprised of business trips, convention activity and studying or teaching trips.
- The most common activity for overseas visitors to Utah is shopping (86%) and dining (81%). National Parks (78%), sightseeing in cities (58%), historic places (55%), touring the countryside (54%) and visiting small towns (51%) are also popular activities among Utah's overseas travelers.
- *Compared to national averages, the overseas visitor to Utah is more than twice as likely to visit Native American communities, camp or hike, visit national parks, gamble, snow ski, participate in environmental or eco excursions, tour the countryside and visit ethnic, cultural or heritage sites.*
- Utah overseas visitors are less likely than the average U.S. overseas visitor to play golf or tennis, go on cruises, participate in water sports or sunbathe, shop or dine in restaurants.



INTERNATIONAL VISITORS TO NATIONAL PARKS

Over 40% of all visitors to Utah were identified as National Park visitors as a result of identifying a national park as a primary destination during a trip to the U.S. Overall, 78% of all Utah's overseas visitors indicated that visiting a national park (whether a primary destination or not) was one of several activities participated in during a U.S. trip. National Park visitors to Utah have specific traveler characteristics that make this traveling segment unique and different from other travel segments.

Demographics. The average national park visitor to Utah is less affluent than other visitors to the state. As a result, average daily spending is also less than the statewide average for all overseas visitors. *Leisure groups (spouse, family members, friends and group tours) are much more common among national park visitors than among all visitors to the state.* European

markets, led by Germany, France and the U.K, dominate the national park traveler segment. Italy, the Benelux countries and Switzerland are also important markets within this travel segment. The only non-European country that represents a significant market for national park travelers is Japan.

Travel Patterns. The national park visitor is typically a less experienced U.S. traveler. Consequently, advance trip decisions are often made well in advance (133 days) and packages are more common than among all overseas travelers to the state. National park travelers typically spend less time in Utah as well as in the U.S. compared to other groups, although they are often more mobile than other travelers, demonstrating a tendency to visit more states and more destinations than all travelers to the state. Car rentals are the preferred choice of transportation within the U.S. While the majority stay in either a hotel or motel, a significant number also camp. Among favored destinations, the national park traveler is more likely to make trips to California (San Francisco, Los Angeles, Yosemite, San Diego and Death Valley), Arizona (Grand Canyon and Phoenix) and Nevada (Las Vegas). Among Utah destinations, Bryce Canyon National Park was the preferred destination, followed by Zion National Park, Monument Valley Navajo Tribal Park and Glen Canyon National Recreation Area. *Salt Lake City was only mentioned as a destination by 4% of national park visitors.*

Purposes and Activities. Travel to national parks is almost exclusively a leisure travel activity. Over 90% of national park travelers to Utah indicated their primary purpose was a leisure trip. As expected, national park travelers tend to participate in a wide variety of outdoor activities. Compared to all travelers to the state, national park travelers are more likely to visit national parks, gamble, visit cultural or heritage sites, camp or hike and participate in an eco or environmental excursion. Conversely, national park visitors are less likely to attend a concert, play or musical, visit a nightclub or sporting event, and play golf, tennis or ski.



INTERNATIONAL VISITORS TO SALT LAKE CITY – BUSINESS AND SKI TRIPS

Nearly a third of all overseas visitors to Utah visited Salt Lake City, making it the most popular Utah destination specifically named in the survey. There are several important differences between overseas visitors to Salt Lake City and overseas visitors to the rest of the state.

Nearly 40% of all visits to Salt Lake City by overseas travelers are made as a result of a business trip. In addition, overseas visitors to Salt Lake City are more than twice as likely to ski than visitors to the rest of the state. The implications of a larger percentage of business travelers and the greater incidence of skier visits significantly influence the characteristics of visitors to the city.

Demographics. Visitors to Salt Lake City are typically more affluent and spend significantly more than their counterparts to the rest of the state. Men, many of whom are traveling alone, comprise a higher percentage of trips to Salt Lake City than to the rest of the state. The business link between Salt Lake City and Japan is especially important and Japanese travelers comprise the second largest group of travelers to Salt Lake City, nearly equal to the number of German travelers. The popularity of Utah skiing among visitors from the U.K, Australia, South America and Scandinavia means that visitors from these regions are more common to Salt Lake City than to the rest of the state. Conversely, Germans, French, Italians and Dutch travelers are less likely to visit Salt Lake City and more likely to visit the rest of the state.

Travel Patterns. Visitors to Salt Lake City typically stay longer in Utah but shorter in the U.S. compared to other overseas visitors to the state. They visit fewer states and destinations than other Utah visitors, and even indicate very little travel to other Utah destinations. Los Angeles and San Francisco remain the primary ports of entry, although Miami and Atlanta each become more important given use of both as a gateway from Latin American countries and the Delta connection between Salt Lake City and Atlanta. Salt Lake City visitors indicate a much shorter planning horizon and are more likely to be frequent travelers to the U.S. than other Utah visitors. Package deals are used even less frequently by travelers to Salt Lake City than to the rest of the state.

Purposes and Activities. As previously indicated, Salt Lake City attracts a significantly greater amount of business-related travel. Within the leisure component however, overseas visitors to Salt Lake City are much more likely to visit friends and relatives than other visitors to the state. Salt Lake City visitors are less likely to participate in many of the common leisure activities indicated by other travelers to the state. Nonetheless, as with all overseas visitors to the state, shopping, dining, national parks, cities, historic places and touring the countryside were still the top activities engaged in by Salt Lake visitors. However, in contrast to other Utah visitors, travelers to Salt Lake City were more likely to visit Yellowstone and the Grand Canyon than to visit the Utah national parks. Salt Lake visitors are more likely to attend a concert, play or musical, visit nightclubs, ski or play golf and tennis.



Photo Credits to Las Vegas News Bureau

SPECIAL NOTE ON INTERNATIONAL VISITORS TO LAS VEGAS

Las Vegas recorded over two million overseas visitors in 1999, nearly six times as many as Utah. McCarran International Airport in Las Vegas accommodated more than 3,500 direct international flights in 2000, most of them from Utah's top international markets – Canada, Japan and the U.K. In addition, growth in international arrivals to Las Vegas is growing much more quickly than growth in international arrivals to Utah. Despite many differences between

overseas visitors to Utah and overseas visitors to Las Vegas, Utah may be able to capitalize on Las Vegas as an international gateway to the state and could potentially increase awareness of Utah attractions by emphasizing Utah's proximity to Las Vegas. From 1997 to 1999, *more than half (53%) of Utah's overseas travelers also visited Las Vegas. But only 10% of all the overseas visitors to Las Vegas came to Utah.* Tapping that large and fast-growing market represents a growth opportunity for Utah's international tourism.

Despite being younger on average, overseas visitors to Las Vegas are more affluent and spend more than overseas visitors to Utah. In addition, Las Vegas captures a much greater percentage of the Asian market. In addition to Japan, Taiwan and South Korea are also among Las Vegas' top markets. Visitors from South America and Mexico also represent a higher percentage of visitors to Las Vegas than to Utah. By contrast, Utah is much more dependent than Las Vegas on Western Europe.

Overseas trips to Las Vegas are typically planned with a much shorter planning horizon than trips to Utah. In addition, travelers to Las Vegas are more likely to take advantage of a packaged deal. Consistent with the greater influence of Asian travel patterns versus Western European travel patterns, trips to Las Vegas are typically shorter and visit fewer states and destinations than trips to Utah. Visitors to Las Vegas are less likely to visit Arizona, Colorado and Wyoming, but more likely to visit Los Angeles, Anaheim and Florida. Overseas travelers to Las Vegas are more likely than their Utah counterparts to stay in a hotel or motel and travel by taxi or limo as opposed to rental cars. Airline service within the U.S. to Las Vegas is also more important than corresponding service to Utah.

The overseas visitor to Utah is more likely to participate in a wide variety of activities. Visitors to Utah are more likely than their Las Vegas counterparts to visit natural resource-based attractions, historic, ethnic or cultural sites, small towns or Native American communities. Overseas visitors to Utah are also more likely to participate in outdoor recreation activities like camping and hiking or snow skiing. On the other hand, Las Vegas travelers are more likely to gamble, visit theme or amusement parks, participate in guided tours and visit nightclubs.

Overseas Visitor Comparison

Traveler Characteristic	Overall Utah	National Parks	Salt Lake City	Las Vegas
Visitation Volume (1999)	391,000	158,000	126,000	2,251,000
Average Age	42.2 Years	42.1 Years	42.0 Years	40.3 Years
Average Household Income	\$72,800	\$66,500	\$80,400	\$73,600
Origin Markets				
Western Europe	76%	86%	56%	48%
Asia	15%	12%	26%	39%
Oceania	4%	2%	7%	5%
South America	3%	0%	6%	5%
U.S. Trips in Last Five Years	4.0	2.7	5.7	4.6
Advance Trip Decision	120 Days	133 Days	95 Days	89 Days
Use of Packages	30%	40%	18%	35%
Per-Day Expenditures	\$81	\$73	\$107	\$110
Accommodations				
Hotel or Motel	76%	80%	71%	96%
Private Home	13%	1%	27%	3%
Other (Camping)	14%	21%	8%	1%
Transportation within the U.S.				
Rental Car	58%	65%	49%	41%
Airlines	40%	30%	49%	50%
Taxi/Cab/Limo	27%	22%	37%	41%
Average Length of Stay in Utah	5.7 Nights	3.7 Nights	7.5 Nights	3.7 Nights (LV)
Average Length of Stay in U.S.	23.5 Nights	20.6 Nights	22.4 Nights	17.3 Nights
Number of States Visited	3.8	3.9	3.3	2.7
Number of Destinations Visited	5.3	6.3	4.1	3.9
Utah Destinations				
Salt Lake City	32%	4%	100%	2%
Bryce Canyon N.P.	25%	63%	3%	4%
Zion N.P.	13%	32%	1%	2%
Monument Valley	12%	30%	2%	2%
Glen Canyon N.R.A.	5%	12%	0%	1%
Other Destinations				
California	70%	83%	48%	75%
Nevada	58%	74%	31%	10% (Utah)
Arizona	55%	81%	16%	24%
Colorado	12%	9%	11%	2%
Wyoming	12%	10%	18%	1%
Purpose of Trip				
Leisure and VFR	81%	93%	62%	80%
Business	19%	7%	38%	20%
Selected Activities				
Visit National Parks	78%	92%	55%	52%
Visit Historic Places	55%	58%	48%	42%
Touring Countryside	54%	58%	42%	36%
Visit Small Towns	51%	54%	38%	39%
Casinos/Gambling	45%	53%	28%	74%
Cultural or Heritage Sites	38%	45%	29%	25%
Visit Am. Indian Comm.	32%	38%	17%	14%
Guided Tours	26%	30%	17%	34%
Camping/Hiking	21%	27%	9%	6%
Concert/Play/Musical	13%	8%	28%	19%
Environ./Eco Excursions	11%	15%	5%	4%
Nightclubs/Dancing	7%	6%	12%	15%
Snow Skiing	6%	1%	13%	2%

SOURCE: TI/ITA, U.S. Dept. of Commerce

INTERNATIONAL MARKET SUMMARIES

- **Canada**
- **Germany**
- **France**
- **United Kingdom**
- **Japan**
- **Netherlands**
- **Italy**
- **Emerging Markets**



CANADA

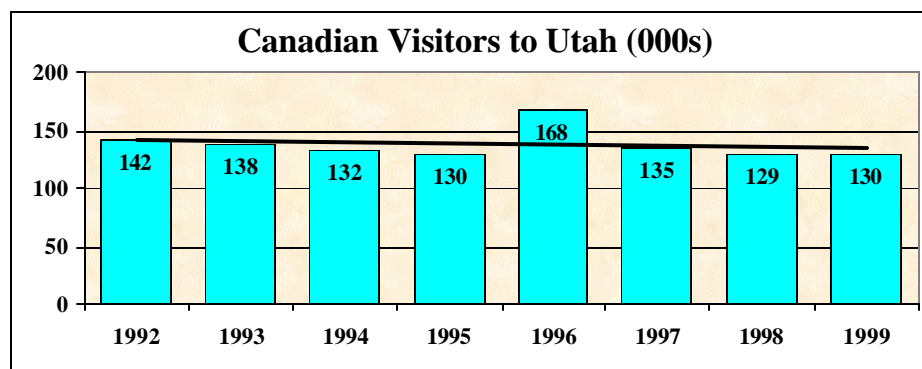
Market Profile Summary

Canada represents the single largest international market for Utah. With an estimated 170,000 arrivals to Utah in 1999, Canadian visitors to the state account for a fourth of all international travelers. Unlike other international markets, the majority of Canadian visitors to Utah arrive via highways and Interstates (70%). Given the similarities between the Canadian consumer and the U.S. consumer, demographics, travel patterns and purposes and activities closely mirror U.S. preferences. In many respects, Canada is often seen as an extension of the U.S. market (Canadian provinces could be compared to states and cities that are located a similar distance from Utah). Despite the similarities, less than half of all Canadians have ever ventured across the border. Thus notwithstanding the cultural similarities, marketing efforts must be directed specifically to Canadians. Relying on a "spill-over" effect from U.S. marketing efforts is not likely to produce significant results.

The exchange rate significantly affects Canadian travel to the U.S. Research indicates the Canadian traveler is very sensitive to exchange rate fluctuations, and the recent strength of the U.S. dollar has dampened Canadian travel to the U.S. Perhaps more important than the actual exchange rate in the mind of consumers is the perceived value of the destination. A destination that is able to successively present itself as a superior destination in terms of value comparisons will likely succeed in the Canadian market.

Utah currently operates four daily flights from Canada to Salt Lake City International Airport (3 from Calgary, 1 from Vancouver), with a daily seat capacity of 50 seats each. However, none of the flights are to the more densely populated Eastern region. According to a 1998 Statistics Canada survey, nearly 75% of all Canadian visitors to Utah arrived from the western Canada provinces of Alberta (49%) and British Columbia (23%). Over 40% of Canadian visitors stay in either a hotel or motel, 14% stay with friends or relatives and 13% stay in campgrounds.

The Canadian economy should grow at levels close to the U.S. over the next few years (between 3.0 and 3.5%). Continued low unemployment and an improving exchange rate should increase Canadian visitation to both the U.S. and Utah over the next few years. Canadian visitors average 3.8 nights within Utah and spend on average \$55 (exchange rate adjusted) per visitor per day.



SOURCE: TI/ITA, U.S. Dept. of Commerce, Statistics Canada



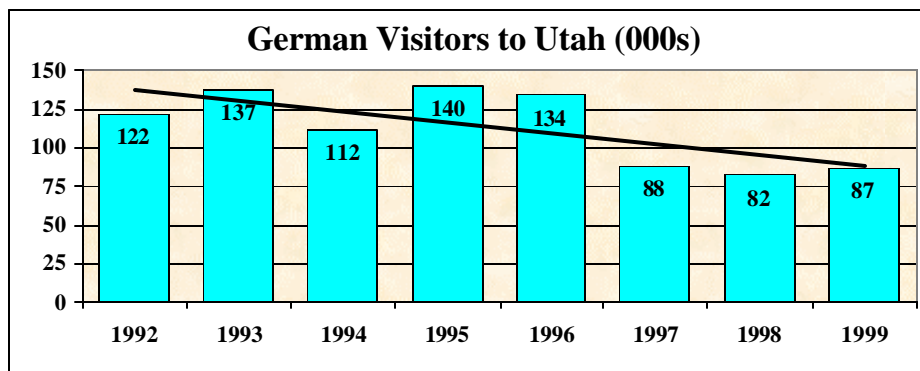
GERMANY

Market Profile Summary

Germans are the world's most active international travelers, boasting more than one trip per capita for the entire German population. *Germans are beginning to look towards non-traditional destinations for their long-haul vacations.* Each of the top four long-haul regions lost market share over 1999, including the U.S. Over the past decade, German arrivals to the U.S. have increased on average 5.7% per year, although the gains were realized almost exclusively in the early 1990s. Visitation peaked in 1996 and has remained at or slightly below that level since then. Overall, most Germans consider international travel a necessity rather than a luxury. Consequently, despite low levels of economic growth, the German long-haul market will likely continue to grow, which should translate into increased visitation to both Utah and the U.S.

From 1992 to 1996, visitation to Utah from Germany remained at approximately 130,000 per year. Since 1996, the number of Germans arriving in Utah has declined to roughly 85,000, where it has remained relatively stable over the past three years. Expectations for the next several years anticipate moderate growth in the German long-haul travel market to the U.S. Utah will likely capture additional German visitors as its market share remains stable relative to the number of U.S. arrivals.

The German economy has been sluggish over the past few years, and real GDP growth improved to only 1.6% in 1999. However, positive indicators such as low inflation, declining unemployment and improving labor markets should help spur the economy to growth rates between 2.5% and 3.5% in the short term. In addition to a sluggish economy, four consecutive years of unfavorable exchange rate movement between the mark and the dollar has dampened U.S. travel prospects. Nevertheless, with improving economic conditions and over 300 non-stop flights from German cities to U.S. cities, travel to the U.S. should improve. German travelers are traditionally the most prolific users of information among all European markets. U.S. market strengths among German travelers are also indicative of Utah's market strengths: outstanding scenery (especially national and state parks), value for money spent, opportunity to increase knowledge and easy accessibility of information for travel planning. German travelers to Utah spend on average \$78 per visitor per day and remain 4.4 nights within the state.



SOURCE: TI/ITA, U.S. Dept. of Commerce

UTAH VISITORS FROM GERMANY SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	40.4
18-34 Years	39%
35-54 Years	44%
55+ Years	17%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$69,800
< \$40,000	29%
\$40,000 - \$80,000	37%
\$80,000 - \$120,000	21%
\$120,000+	13%

PARTY COMPOSITION

Avg. Travel Party (mean)	1.6
Family/Relatives	40%
Spouse	32%
Friends	20%
Traveling Alone	20%
Tour Group	3%
Business Associates	1%
Adults Only	88%
Adults and Children	12%

GENDER

Men	69%
Women	31%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	63%
U.S. Trips last 12 Months	1.4
U.S. Trips last 5 Years	3.2
1 Trip	46%
2 - 5 Trips	39%
5+ Trips	15%

OTHER DESTINATIONS VISITED

# of States Visited	4.1
# of Destinations Visited	6.0
California	82%
San Francisco	52%
Los Angeles	44%
San Diego	17%
Yosemite N.P.	17%
Nevada	72%
Las Vegas	64%
Arizona	71%
Grand Canyon N.P.	38%
Phoenix	9%
Colorado	14%
Wyoming	13%
Yellowstone N.P.	10%
New York	9%
New York City	8%
New Mexico	7%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	153 Days
Advance Air Reservations	103 Days
Use of Pre-Booked Lodging	68%

USE OF PACKAGES

YES	28%
Air/Lodging	18%
Guided Tour	13%
Air/Rental Car	12%
Air/Lodging/Tour	10%
Air/Lodging/Bus	9%
Air/Lodging/Bus/Tour	8%
Air/Lodging/Rental Car	7%
Advance Package Booking	121 Days
# of Nights Pre-paid as Part of a Package	14.0

INFORMATION SOURCES

State/City Travel Office	48%
Travel Guides	47%
Travel Agency	46%
Friends/Relatives	30%
Personal Computer	14%
Tour Company	13%
Newspapers/Magazines	10%
Airlines Directly	5%
Other	11%

ACCOMMODATIONS

Hotel/Motel	71%
Private Home	6%
Other	25%

TRANSPORTATION IN U.S.

Rented Auto	70%
Airlines in U.S.	24%
City Subway/Tram/Bus	16%
Taxi/Cab/Limousine	16%
Company or Private Auto	16%
Motor Home/Camper	11%
Bus Between Cities	6%
Other	3%

LENGTH OF STAY

# of Nights In UT (mean)	4.4
# of Nights in US (mean)	22.9

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	31%
Salt Lake City	21%
Zion N.P.	15%
Monument Valley	8%
Glen Canyon	4%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	95%
Leisure/Rec./Holidays	91%
Visit Friends/Relatives	4%
Business & Convention	5%
Business/Professional	4%
Convention/Conference	1%
Study/Teaching	1%

PORT OF ENTRY

Los Angeles	26%
San Francisco	16%
Chicago	9%
New York	8%

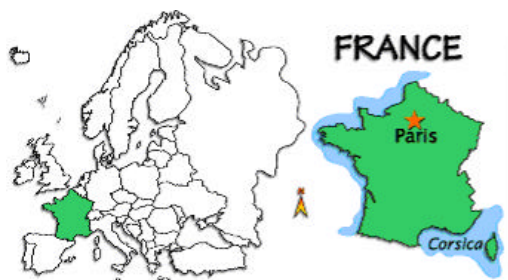
LEISURE ACTIVITIES

Visit National Parks	94%
Shopping	86%
Dining in Restaurants	77%
Touring Countryside	67%
Visit Historic Places	67%
Cultural or Heritage Sites	55%
Amusement/Theme Parks	53%
Sightseeing in Cities	53%
Visit Small Towns	53%
Casinos/Gambling	51%
Camping/Hiking	35%
Visit Am. Indian Comm.	30%
Guided Tours	29%
Water Sports/Sunbathing	28%
Art Gallery/Museum	26%
Concert/Play/Musical	15%
Ethnic Heritage Sites	10%
Nightclubs/Dancing	7%
Attend Sports Event	7%
Environ./Eco Excursions	5%
Cruises	4%
Golfing/Tennis	3%
Snow Skiing	2%
Ranch Vacations	2%
Hunting/Fishing	1%

PERFORMANCE

Total Int'l. Visitation (000s)	87
Market Share	4.4%
Avg. Spending Per-Visitor-Per-Day (mean)	\$78

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries



FRANCE

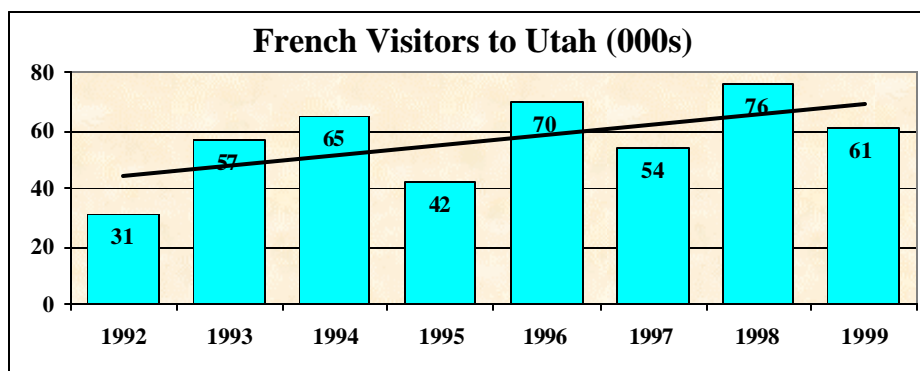
Market Profile Summary

Total outbound travel from France grew 4.2% in 1999. U.S. arrivals from France mirrored total outbound growth, posting a 4.5% increase in 1999. Despite the growth in arrivals, the U.S. lost market share as a long-haul destination to other travel regions, especially Africa. The increase in U.S. arrivals in 1999 was consistent with the 4.4% average annual growth of French arrivals to the U.S. this decade. Significantly, French arrivals to the U.S. passed the million mark for the second consecutive year in 1999. Since 1990, the only years in which visitation to the U.S. has declined was in 1994 and again in 1997. However, since the first of the decade, the U.S. has lost market share as a long-haul destination in seven of the last nine years.

France represents Utah's second largest overseas market and was responsible for attracting an estimated 80,000 visitors to the state in 1999. Since 1992, visitation to Utah from France has been somewhat volatile, although the number of visitors has definitely increased. The upward trend in French visitation to Utah is much higher than the upward trend among total U.S. arrivals, suggesting Utah is gaining market share among French visitors. The average length of stay among French visitors to Utah is 3.0 nights. French travelers spend on average \$71 per visitor per day.

French travelers expect destinations to establish a reputation for service and reliability and, consequently, new destinations are often viewed skeptically. *Utah's image in France is reliant on its association with a high concentration of national parks and other scenic attractions.* Economic forecasts in France are optimistic for increased travel, highlighted by solid job creation, strong domestic demand and high consumer confidence.

The French franc declined against the U.S. dollar in 1999 for the fourth consecutive year. However, French participation in the "euro zone" should provide some stabilizing influence that will likely favor outbound travel. Whether or not the U.S. and subsequently Utah experience increased visitation will likely be determined by how well they can compete against the increasing popularity of other regional destinations, notably Africa, Asia and South America. Growth forecasts for French arrivals to the U.S. mirror historic growth rates and should remain between 4% and 5%.



SOURCE: TI/ITA, U.S. Dept. of Commerce

UTAH VISITORS FROM FRANCE SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	44.0
18-34 Years	23%
35-54 Years	63%
55+ Years	14%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$68,000
< \$40,000	28%
\$40,000 - \$80,000	42%
\$80,000 - \$120,000	18%
\$120,000+	13%

PARTY COMPOSITION

Avg. Travel Party (mean)	2.5
Spouse	49%
Family/Relatives	38%
Friends	17%
Tour Group	13%
Traveling Alone	11%
Business Associates	5%
Adults Only	84%
Adults and Children	16%

GENDER

Men	68%
Women	32%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	59%
U.S. Trips last 12 Months	1.7
U.S. Trips last 5 Years	4.0
1 Trip	51%
2 - 5 Trips	34%
5+ Trips	15%

OTHER DESTINATIONS VISITED

# of States Visited	3.9
# of Destinations Visited	5.7
California	80%
San Francisco	66%
Los Angeles	50%
Yosemite N.P.	19%
Nevada	74%
Las Vegas	70%
Arizona	72%
Grand Canyon N.P.	41%
Phoenix	19%
Tuscon	8%
New Mexico	11%
Albuquerque	8%
New York	10%
New York City	10%
Colorado	6%
Florida	6%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	131 Days
Advance Air Reservations	83 Days
Use of Pre-Booked Lodging	70%

USE OF PACKAGES

YES	46%
Air/Lodging	33%
Guided Tour	28%
Air/Lodging/Tour	19%
Air/Lodging/Rental Car	17%
Air/Rental Car	16%
Air/Lodging/Bus	14%
Air/Lodging/Bus/Tour	14%
Advance Package Booking	91 Days
# of Nights Pre-paid as Part of a Package	13.6

INFORMATION SOURCES

Travel Agency	75%
Airlines Directly	15%
Friends/Relatives	13%
Travel Guides	12%
Newspapers/Magazines	9%
Tour Company	8%
Personal Computer	4%
Corporate Travel Dept.	3%
Other	5%

ACCOMMODATIONS

Hotel/Motel	89%
Private Home	3%
Other	9%

TRANSPORTATION IN U.S.

Rented Auto	55%
Airlines in U.S.	41%
Taxi/Cab/Limousine	20%
Company or Private Auto	20%
City Subway/Tram/Bus	18%
Bus Between Cities	17%
Other	7%

LENGTH OF STAY

# of Nights In UT (mean)	3.0
# of Nights in US (mean)	18.8

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	35%
Monument Valley	23%
Salt Lake City	12%
Zion N.P.	11%
Glen Canyon	11%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	75%
Leisure/Rec./Holidays	71%
Visit Friends/Relatives	2%
Religious Pilgrimage	1%
Business & Convention	26%
Business/Professional	16%
Convention/Conference	9%
Study/Teaching	1%

PORT OF ENTRY

Los Angeles	19%
San Francisco	14%
New York	11%
Philadelphia	9%

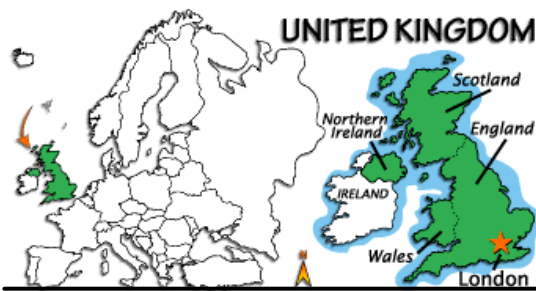
LEISURE ACTIVITIES

Visit National Parks	88%
Shopping	84%
Dining in Restaurants	75%
Casinos/Gambling	68%
Sightseeing in Cities	62%
Visit Small Towns	57%
Visit Historic Places	55%
Amusement/Theme Parks	46%
Guided Tours	34%
Visit Am. Indian Comm.	34%
Cultural or Heritage Sites	33%
Art Gallery/Museum	32%
Touring Countryside	29%
Environ./Eco Excursions	28%
Water Sports/Sunbathing	18%
Camping/Hiking	14%
Ethnic Heritage Sites	11%
Nightclubs/Dancing	9%
Concert/Play/Musical	3%
Attend Sports Event	2%
Ranch Vacations	2%
Cruises	2%
Snow Skiing	1%
Golfing/Tennis	1%
Hunting/Fishing	1%

PERFORMANCE

Total Int'l. Visitation (000s)	61
Market Share	5.8%
Avg. Spending Per-Visitor-Per-Day (mean)	\$71

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries



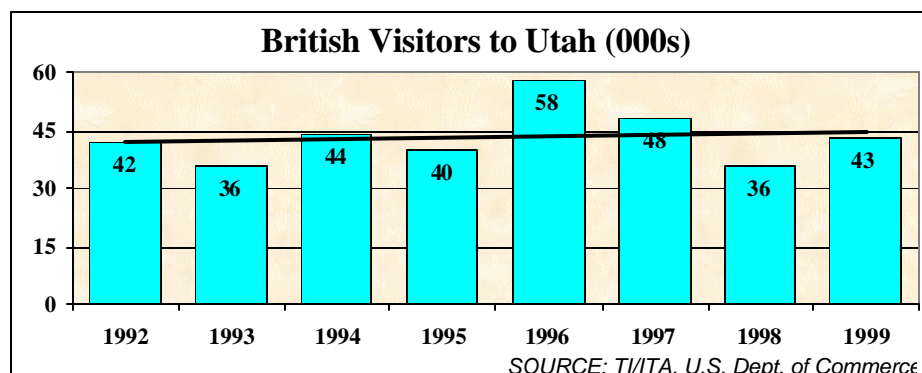
UNITED KINGDOM

Market Profile Summary

Total outbound travel from the United Kingdom increased strongly in 1999 at 7.1%. Long-haul travel grew slightly less at 6.2%. Arrival numbers from the U.K. to the U.S. have grown steadily for most of the past decade, with average growth rates of around 7%. The only year since 1990 in which visitation to the U.S. has declined was in 1994. However, arrivals rebounded in 1995 and have continued to grow steadily since then. Since 1995, total U.S. arrivals from the U.K. have grown 47%, capturing an increasing share of the long-haul travel market in each year.

The U.K. remains one of Utah's top international markets. Since 1992, visitation to Utah from the U.K. has been somewhat volatile, although the number of visitors usually fluctuates between 40,000 and 50,000. Utah has not participated in the steady increase in British visitors to the U.S. Consequently, Utah has experienced slight erosion in market share among British travelers. The biggest advantage for the traveler from the U.K. is the familiarity with the language and confidence in being able to travel independently. *Most travelers to Utah from the U.K. are repeat visitors who have previous U.S. travel experience. Consequently, many Brits look to Utah as a new and unique destination.* The presence of direct flights to Las Vegas from the U.K. bodes well for future travel to Utah as more British travelers look to convenient destinations outside Las Vegas. In addition, the U.K. represents Utah's largest international ski market. On average, visitors from the U.K. stay four additional nights in Utah than other overseas visitors to the state. The average daily expenditure per visitor from the U.K. is \$55.

The British economy grew slowly in 1999, with real GDP rising at only 2.0%. The strength of the pound relative to the Euro and other European currencies was at a fifteen year high, likely contributing to low net exports. Nevertheless, private consumption fueled the British economy in much the same way as it did the U.S. economy. The next few years should see continued growth in the U.K.'s economy as exports recover and consumption remains steady. Overall, economic conditions in the U.K. are conducive to growth in the long-haul travel market. More Britons are employed than in recent years and wages are higher. At the same time, the savings rate is relatively high. These indicators suggest that pleasure travel is within the reach of the average economically active resident. Growth forecasts for British arrivals to the U.S. mirror historic growth rates and should remain around 7%.



UTAH VISITORS FROM THE U.K. SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	45.0
18-34 Years	31%
35-54 Years	37%
55+ Years	32%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$72,500
< \$40,000	23%
\$40,000 - \$80,000	48%
\$80,000 - \$120,000	16%
\$120,000+	13%

PARTY COMPOSITION

Avg. Travel Party (mean)	1.8
Spouse	48%
Traveling Alone	24%
Family/Relatives	19%
Friends	10%
Business Associates	8%
Adults Only	97%
Adults and Children	3%

GENDER

Men	63%
Women	37%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	85%
U.S. Trips last 12 Months	1.6
U.S. Trips last 5 Years	4.5
1 Trip	20%
2 - 5 Trips	60%
5+ Trips	20%

OTHER DESTINATIONS VISITED

# of States Visited	3.4
# of Destinations Visited	5.1
California	46%
Los Angeles	24%
San Francisco	24%
Yosemite N.P.	9%
Nevada	42%
Las Vegas	38%
Arizona	47%
Grand Canyon N.P.	30%
Phoenix	15%
Wyoming	15%
Yellowstone	11%
New York	10%
New York City	9%
Colorado	18%
Denver	15%
Illinois	13%
Chicago	12%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	127 Days
Advance Air Reservations	91 Days
Use of Pre-Booked Lodging	61%

USE OF PACKAGES

YES	30%
Air/Lodging	20%
Air/Rental Car	16%
Guided Tour	15%
Air/Lodging/Rental Car	11%
Air/Lodging/Tour	7%
Air/Lodging/Bus	4%
Air/Lodging/Bus/Tour	3%
Advance Package Booking	127 Days
# of Nights Pre-paid as Part of a Package	11.5

INFORMATION SOURCES

Travel Agency	70%
Friends/Relatives	18%
Travel Guides	17%
Airlines Directly	14%
Tour Company	13%
Personal Computer	12%
Newspapers/Magazines	11%
State/City Travel Office	5%
Other	5%

ACCOMMODATIONS

Hotel/Motel	78%
Private Home	11%
Other	15%

TRANSPORTATION IN U.S.

Rented Auto	52%
Airlines in U.S.	38%
Taxi/Cab/Limousine	30%
Company or Private Auto	30%
Bus Between Cities	12%
City Subway/Tram/Bus	11%
Other	5%

LENGTH OF STAY

# of Nights In UT (mean)	9.7
# of Nights in US (mean)	23.4

UTAH DESTINATIONS VISITED

Salt Lake City	36%
Bryce Canyon N.P.	23%
Zion N.P.	21%
Monument Valley	11%
Glen Canyon	5%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	82%
Leisure/Rec./Holidays	66%
Visit Friends/Relatives	16%
Business & Convention	18%
Business/Professional	13%
Convention/Conference	5%

PORT OF ENTRY

Los Angeles	19%
San Francisco	14%
Chicago	13%
Newark	7%

LEISURE ACTIVITIES

Dining in Restaurants	96%
Shopping	84%
Touring Countryside	75%
Visit National Parks	74%
Sightseeing in Cities	57%
Visit Historic Places	55%
Visit Small Towns	52%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	32%
Casinos/Gambling	29%
Amusement/Theme Parks	29%
Water Sports/Sunbathing	23%
Guided Tours	23%
Ethnic Heritage Sites	22%
Art Gallery/Museum	20%
Camping/Hiking	17%
Concert/Play/Musical	15%
Nightclubs/Dancing	14%
Attend Sports Event	13%
Snow Skiing	11%
Environ./Eco Excursions	8%
Ranch Vacations	5%
Golfing/Tennis	4%
Cruises	3%
Hunting/Fishing	3%

PERFORMANCE

Total Int'l. Visitation (000s)	43
Market Share	1.0%
Avg. Spending Per-Visitor-Per-Day (mean)	\$55

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries



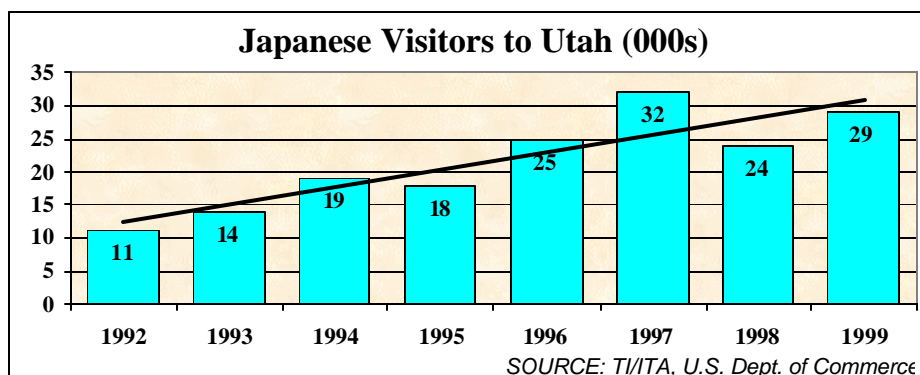
JAPAN

Market Profile Summary

Total outbound travel from Japan increased 4.7% in 1999 over 1998, while long-haul travel grew less at 1.6%. However, after growing significantly for most of the last decade, Japanese arrivals to the U.S. decreased for the second consecutive year in 1999, depressed by the remnants of the regional financial crisis and slow economic recovery. Japanese arrivals in the U.S., which grew 51% between 1993 and 1997, dropped -1.2% in 1999, following a much larger decrease of -9.0% in 1998. Throughout the decade of the 1990s, the U.S. and Europe have consistently captured over 90% of all Japanese long-haul travel, and did so again in 1999. However, Europe has been gaining Japanese market share over the last three years, while the U.S. has been losing share.

Japan represents Utah's fastest growing international market. Despite economic difficulty in recent years, travel from Japan has increased by 170% since 1992. Estimated arrivals in 1999 increased to nearly 40,000 after declining in the wake of the Asian financial crisis. As Japan's economy continues its slow recovery, it is expected that visitation to Utah will resume its upward growth characteristic of the 1990s. The business traveler, comprising nearly 35% of all Utah arrivals, represents an important segment among Japanese travelers to Utah. Additional segments that are receiving attention are young adult women and matures. Both segments represent future opportunities. Japanese travelers are traditionally the highest spenders among all international markets, spending on average \$141 per visitor per day. However, trips from Japan tend to be shorter than European vacations. The average length of stay in Utah among Japanese travelers is 4.6 nights, compared to the average of 5.7 nights for all overseas travelers.

The Japanese economy started to show slow, but positive growth again in 2000, with estimated real GDP up by 2.1%, a considerable improvement from 1999's 0.3%. Forecasts suggest that Japan's economy will continue to rebound, improving to around 3.0% growth over the next two years. Thus, confidence should return to the Japanese traveler and arrivals to the U.S. from Japan are expected to grow by as much as 5%. In addition, the yen continued to appreciate against the U.S. dollar in 2000. Its appreciation is expected to continue, which should also have a positive impact on Japanese arrivals to the U.S.



UTAH VISITORS FROM JAPAN SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	42.7
18-34 Years	32%
35-54 Years	48%
55+ Years	20%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$89,600
< \$40,000	19%
\$40,000 - \$80,000	32%
\$80,000 - \$120,000	25%
\$120,000+	25%

PARTY COMPOSITION

Avg. Travel Party (mean)	1.7
Traveling Alone	32%
Spouse	23%
Family/Relatives	17%
Friends	16%
Business Associates	13%
Group Tour	12%
Adults Only	96%
Adults and Children	4%

GENDER

Men	68%
Women	32%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	79%
U.S. Trips last 12 Months	2.0
U.S. Trips last 5 Years	5.7
1 Trip	35%
2 - 5 Trips	34%
5+ Trips	31%

OTHER DESTINATIONS VISITED

# of States Visited	3.4
# of Destinations Visited	4.5
California	65%
Los Angeles	38%
San Francisco	21%
Yosemite N.P.	7%
Nevada	58%
Las Vegas	44%
Arizona	38%
Grand Canyon N.P.	26%
Wyoming	17%
Yellowstone	15%
New York	11%
New York City	10%
Colorado	6%
Washington	6%
Seattle	6%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	59 Days
Advance Air Reservations	26 Days
Use of Pre-Booked Lodging	78%

USE OF PACKAGES

YES	28%
Guided Tour	25%
Air/Lodging	21%
Air/Lodging/Tour	18%
Air/Lodging/Bus	11%
Air/Lodging/Bus/Tour	11%
Air/Rental Car	3%
Air/Lodging/Rental Car	1%
Advance Package Booking	61 Days
# of Nights Pre-paid as Part of a Package	8.8

INFORMATION SOURCES

Travel Agency	61%
Travel Guides	18%
Friends/Relatives	17%
Tour Company	17%
Personal Computer	15%
Newspapers/Magazines	11%
Corp. Travel Department	11%
Airlines Directly	11%
Other	5%

ACCOMMODATIONS

Hotel/Motel	83%
Private Home	13%
Other	6%

TRANSPORTATION IN U.S.

Airlines in U.S.	66%
Taxi/Cab/Limousine	45%
Rented Auto	42%
Company or Private Auto	37%
City Subway/Tram/Bus	23%

LENGTH OF STAY

# of Nights In UT (mean)	4.6
# of Nights in US (mean)	12.7

UTAH DESTINATIONS VISITED

Salt Lake City	55%
Bryce Canyon N.P.	22%
Monument Valley	17%
Zion N.P.	12%
Glen Canyon	10%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	65%
Leisure/Rec./Holidays	52%
Visit Friends/Relatives	13%
Business & Convention	35%
Business/Professional	27%
Convention/Conference	3%
Study/Teaching	3%

PORT OF ENTRY

Los Angeles	28%
San Francisco	28%
Portland	21%
Seattle	5%

LEISURE ACTIVITIES

Shopping	84%
Dining in Restaurants	78%
Visit National Parks	56%
Sightseeing in Cities	54%
Visit Small Towns	42%
Touring Countryside	37%
Visit Am. Indian Comm.	36%
Guided Tours	31%
Casinos/Gambling	29%
Amusement/Theme Parks	27%
Visit Historic Places	26%
Camping/Hiking	19%
Cultural or Heritage Sites	18%
Art Gallery/Museum	13%
Ethnic Heritage Sites	11%
Concert/Play/Musical	11%
Water Sports/Sunbathing	10%
Nightclubs/Dancing	10%
Cruises	8%
Golfing/Tennis	8%
Snow Skiing	5%
Attend Sports Event	4%
Environ./Eco Excursions	3%
Ranch Vacations	2%
Hunting/Fishing	2%

PERFORMANCE

Total Int'l. Visitation (000s)	29
Market Share	0.6%
Avg. Spending Per-Visitor-Per-Day (mean)	\$141

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries



NETHERLANDS

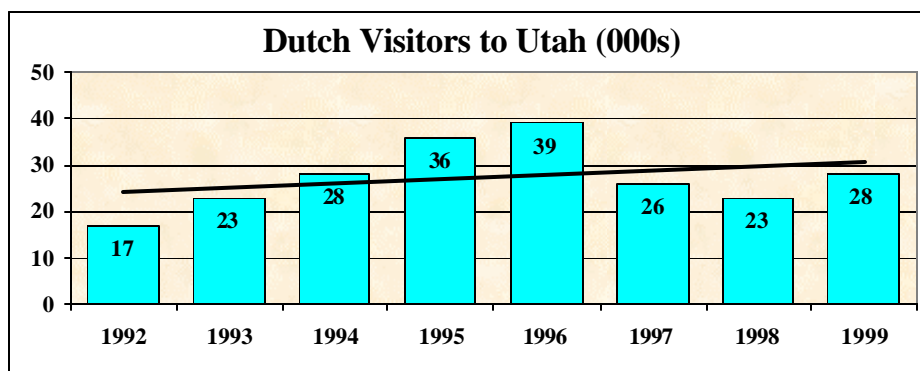
Market Profile Summary

International travel has become more popular in the Netherlands as total outbound travel has increased steadily at nearly 9% over the past five years. Long-haul travel has grown even faster, averaging just over 10% growth per year.

The Netherlands is part of a tri-country area known as the Benelux Countries (Netherlands, Belgium and Luxembourg). Collectively, the Benelux Countries have represented around 40,000 visits to Utah each year, of which the most significant is the Dutch market. Visitation patterns from the Benelux Countries to Utah mirror the German market performance. From 1992 to 1996, the number of visitors to Utah from the Benelux Countries increased significantly. However, since 1996, visitation has dropped and currently remains stable.

Citizens of the Netherlands receive an average of 4-6 weeks of vacation time each year as well as 13 full months of salary, enabling them to plan for nearly any type of vacation. Benelux markets are price sensitive and currency fluctuations do influence international travel decisions. Utah enjoys strong identity factors in the Benelux markets for its vast expanses of scenic landscapes, wild rivers and national parks. Winter sports travel, particularly among the Dutch, represents a great potential for additional product development. Visitors from the Netherlands spend on average \$74 per visitor per day and remain in Utah approximately 4.4 nights.

The Dutch economy has grown steadily and consistently at around 3.0% per year since 1996, although it has slowed some in the last few years. Unemployment is the lowest among all European Union countries and inflation has remained stable for the past five years. Stability in the economy has spurred consumer confidence, which is good news for outbound travel. Forecasts indicate continued growth in the Dutch travel market of around 7% for the next few years.



SOURCE: TI/ITA, U.S. Dept. of Commerce

UTAH VISITORS FROM THE NETHERLANDS SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	42.0
18-34 Years	38%
35-54 Years	45%
55+ Years	17%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$62,300
< \$40,000	27%
\$40,000 - \$80,000	44%
\$80,000 - \$120,000	28%
\$120,000+	2%

PARTY COMPOSITION

Avg. Travel Party (mean)	1.9
Family/Relatives	44%
Spouse	33%
Friends	12%
Traveling Alone	11%
Business Associates	5%
Tour Group	2%
Adults Only	95%
Adults and Children	6%

GENDER

Men	61%
Women	40%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	66%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	3.0
1 Trip	39%
2 - 5 Trips	53%
5+ Trips	8%

OTHER DESTINATIONS VISITED

# of States Visited	3.8
# of Destinations Visited	5.7
California	68%
San Francisco	32%
Los Angeles	32%
Yosemite N.P.	18%
Riverside/San Bernadino	12%
Death Valley N.P.	10%
Nevada	56%
Las Vegas	45%
Arizona	56%
Grand Canyon N.P.	29%
Colorado	24%
Denver	13%
Wyoming	12%
Yellowstone N.P.	9%
New York	11%
New York City	11%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	129 Days
Advance Air Reservations	85 Days
Use of Pre-Booked Lodging	71%

USE OF PACKAGES

YES	32%
Air/Rental Car	20%
Air/Lodging	19%
Air/Lodging/Tour	10%
Guided Tour	7%
Air/Lodging/Rental Car	2%
Advance Package Booking	121 Days
# of Nights Pre-paid as Part of a Package	14.0

INFORMATION SOURCES

Travel Agency	80%
Travel Guides	27%
Friends/Relatives	21%
Personal Computer	16%
Tour Company	7%
Newspapers/Magazines	6%
Airlines Directly	5%
State/City Travel Office	4%
Other	11%

ACCOMMODATIONS

Hotel/Motel	72%
Private Home	12%
Other	21%

TRANSPORTATION IN U.S.

Rented Auto	56%
Taxi/Cab/Limousine	36%
Airlines in U.S.	28%
City Subway/Tram/Bus	19%
Railroad Between Cities	18%
Company or Private Auto	15%
Bus Between Cities	11%
Motor Home/Camper	5%

LENGTH OF STAY

# of Nights In UT (mean)	4.4
# of Nights in US (mean)	22.7

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	27%
Salt Lake City	22%
Zion N.P.	14%
Monument Valley	6%
Glen Canyon	4%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	89%
Leisure/Rec./Holidays	79%
Visit Friends/Relatives	10%
Business & Convention	11%
Business/Professional	7%
Convention/Conference	3%
Study/Teaching	1%

PORT OF ENTRY

Los Angeles	23%
Washington D.C.	15%
San Francisco	10%
Minneapolis/St. Paul	9%
New York	8%

LEISURE ACTIVITIES

Visit National Parks	91%
Shopping	89%
Dining in Restaurants	88%
Touring Countryside	86%
Sightseeing in Cities	80%
Visit Historic Places	67%
Visit Small Towns	62%
Casinos/Gambling	48%
Amusement/Theme Parks	45%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	43%
Art Gallery/Museum	35%
Camping/Hiking	33%
Guided Tours	25%
Water Sports/Sunbathing	25%
Concert/Play/Musical	20%
Golfing/Tennis	9%
Environ./Eco Excursions	8%
Nightclubs/Dancing	8%
Attend Sports Event	5%
Snow Skiing	5%
Ethnic Heritage Sites	5%
Cruises	2%
Ranch Vacations	1%
Hunting/Fishing	--

PERFORMANCE

Total Int'l. Visitation (000s)	28
Market Share	5.4%
Avg. Spending Per-Visitor-Per-Day (mean)	\$74

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries



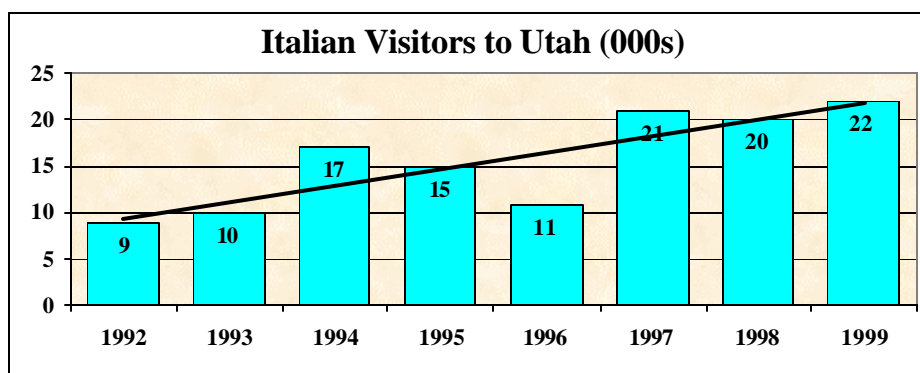
ITALY

Market Profile Summary

Recently, outbound travel from Italy has reached historic volume, with over 20 million Italians looking to International destinations to spend their vacation time. Long-haul travel from Italy was up significantly in 1999, increasing nearly 12% over 1998. Although travel to the U.S. from Italy in 1999 reached the highest level in a decade, the U.S. still lost market share to other long-haul destinations as Italians continue to look for new and unique destinations in other regions of the world.

Italy is one of Utah's fastest growing overseas markets. Italian arrivals to Utah have grown from around ten thousand per year at the start of the 1990s to over twenty thousand per year in 1999. The Italian traveler has shown a fascination with the western U.S., with three Western states among the top six most popular U.S. destinations. The combination of large cities, national parks, Western heritage and Native American sites are a popular attraction for the independent-minded Italian traveler. Italians generally arrive as free, independent travelers, often on a 15-day self-guided drive tour. They are consistently among the highest spenders of any group, averaging \$93 per visitor per day. Italians generally spend less time in the U.S. than other European markets although they visit the same number of destinations. Consequently, the time the Italian traveler spends in each destination is less than the time spent by travelers from other markets. On average, Italian travelers spend 2.3 nights in Utah.

The Italian economy has remained sluggish over the past five years, far under-performing its "euro-zone" neighbors. Despite slow GDP growth and relatively high unemployment, consumer spending remains positive. Consumer confidence has been buoyed by low inflation, membership in the "euro-zone" and positive forecasts for the future. The Italian lira has depreciated against the dollar but remained stable versus other currencies around the world. This may explain some of the loss in U.S. market share. Nonetheless, because Italy is in the euro-zone, its individual currency is now pegged to the euro and optimism regarding the euro's value versus the dollar should mitigate the effects of any further lira depreciation.



SOURCE: TI/ITA, U.S. Dept. of Commerce

UTAH VISITORS FROM ITALY SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	38.7
18-34 Years	45%
35-54 Years	48%
55+ Years	8%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$65,200
< \$40,000	36%
\$40,000 - \$80,000	37%
\$80,000 - \$120,000	14%
\$120,000+	12%

PARTY COMPOSITION

Avg. Travel Party (mean)	2.5
Spouse	37%
Family/Relatives	36%
Friends	25%
Tour Group	11%
Traveling Alone	8%
Business Associates	3%
Adults Only	84%
Adults and Children	16%

GENDER

Men	76%
Women	24%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	51%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	2.8
1 Trip	56%
2 - 5 Trips	34%
5+ Trips	10%

OTHER DESTINATIONS VISITED

# of States Visited	4.1
# of Destinations Visited	5.8
California	72%
San Francisco	56%
Los Angeles	50%
Yosemite N.P.	24%
Nevada	75%
Las Vegas	70%
Arizona	63%
Grand Canyon N.P.	49%
Phoenix	13%
New York	27%
New York City	27%
Wyoming	14%
Yellowstone N.P.	13%
Colorado	14%
Florida	11%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	89 Days
Advance Air Reservations	52 Days
Use of Pre-Booked Lodging	75%

USE OF PACKAGES

YES	29%
Air/Lodging	20%
Air/Rental Car	16%
Guided Tour	13%
Air/Lodging/Rental Car	11%
Air/Lodging/Tour	9%
Air/Lodging/Bus	8%
Air/Lodging/Bus/Tour	8%
Advance Package Booking	57 Days
# of Nights Pre-paid as Part of a Package	15.2

INFORMATION SOURCES

Travel Agency	81%
Friends/Relatives	23%
Travel Guides	20%
Newspapers/Magazines	14%
Personal Computer	14%
Airlines Directly	7%
Tour Company	4%
State/City Travel Office	4%
Other	7%

ACCOMMODATIONS

Hotel/Motel	87%
Private Home	9%
Other	5%

TRANSPORTATION IN U.S.

Rented Auto	83%
Airlines in U.S.	47%
Taxi/Cab/Limousine	35%
City Subway/Tram/Bus	23%
Company or Private Auto	12%
Bus Between Cities	8%
Other	4%

LENGTH OF STAY

# of Nights In UT (mean)	2.3
# of Nights in US (mean)	17.9

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	33%
Monument Valley	21%
Salt Lake City	20%
Zion N.P.	12%
Glen Canyon	3%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	92%
Leisure/Rec./Holidays	92%
Visit Friends/Relatives	1%
Business & Convention	8%
Business/Professional	5%
Convention/Conference	2%
Study/Teaching	1%

PORT OF ENTRY

New York	32%
Los Angeles	20%
San Francisco	8%
Newark	8%
Miami	8%

LEISURE ACTIVITIES

Visit National Parks	93%
Shopping	83%
Dining in Restaurants	81%
Sightseeing in Cities	76%
Amusement/Theme Parks	64%
Visit Historic Places	60%
Visit Small Towns	57%
Visit Am. Indian Comm.	54%
Casinos/Gambling	50%
Touring Countryside	33%
Cultural or Heritage Sites	30%
Art Gallery/Museum	29%
Water Sports/Sunbathing	22%
Concert/Play/Musical	20%
Guided Tours	20%
Environ./Eco Excursions	14%
Ethnic Heritage Sites	12%
Camping/Hiking	11%
Nightclubs/Dancing	7%
Golfing/Tennis	5%
Attend Sports Event	4%
Ranch Vacations	4%
Cruises	2%
Hunting/Fishing	--
Snow Skiing	--

PERFORMANCE

Total Int'l. Visitation (000s)	22
Market Share	3.5%
Avg. Spending Per-Visitor-Per-Day (mean)	\$93

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

Emerging Market Summaries

Argentina. Since 1990, the number of Argentine travelers to the U.S. has increased an astounding 183%, outperforming nearly every other international market. Although growing, international travel in Argentina is still limited to the upper socio-economic groups. Individuals from these groups travel frequently. Argentine travelers tend to use packages more frequently and are more reliant on travel agents than other Latin American markets. Travel from Argentina to the U.S. is currently focused on the East Coast. However, Argentina boasts a large number of skiers who currently travel to Colorado to ski during their summer vacation (seasons are reversed in the Southern Hemisphere). On average, Argentine travelers to the U.S. stay 14.5 nights in the U.S. and spend \$114 per day.

Australia. Along with Japan, Australian arrivals focus on the West coast. As more and more Australians travel overseas, they look beyond the primary destinations of California, Hawaii and Nevada towards other destinations such as Arizona, Colorado and Utah. Since language is not a barrier to Australian travelers, they tend to travel independently and customize their U.S. vacation. Australians tend to stay longer in Utah (7.1 nights) and in the U.S. than nearly any other visitor (34.7 nights). Australia is a top international ski market for Utah, thus more Australians are likely to visit Salt Lake City than other parts of the state. On average, visitors from Australia spend \$71 per visitor per day during their U.S. trip. Outbound travel to the U.S. from Australia is expected to increase as Australia's economy experiences robust growth through the next several years and the exchange rate between the U.S. and Australia improves.

Brazil. Until very recently, flights to the U.S. were cheaper for Brazilian travelers than flights within their own country. One of the world's largest countries with a sizeable economy, Brazil has a well-traveled segment of its population that looks to travel in luxury. Like other Latin American markets, international travel is limited to the upper socio-economic groups. Brazilian travelers to the U.S. spend \$126 per day within the U.S., higher than most other international markets and the highest of any Latin American country. Brazil has encountered significant economic instability recently and the effect has been a downturn in international travel. However, Brazil's economy is expected to improve in the short run although the currency remains vulnerable, making the exchange rate unpredictable.

Korea. The effects of the Asian economic crisis in 1998 hit Korea particularly hard. As a result, arrivals to the U.S. from Korea decreased significantly. Although recovery has been swifter than was initially anticipated, many consumers are still wary and international travel has not yet returned to pre-1998 levels. Korean travelers are known for long stays in the U.S., with a relatively large portion visiting friends and relatives. Most prefer to visit large cities, theme parks and national parks. Korean travelers are less reliant on tour packages than other Asian markets.

Mexico. Representing the second largest international market for the U.S., nearly 90% of all outbound travel from Mexico is to the United States. Although only one in ten residents of Mexico can afford to travel to the U.S., growth in the economy has made U.S. travel increasingly affordable for Mexican residents. Economic growth has been especially strong in the U.S.-Mexican border states, stimulating cross border travel. The Southwest is a popular destination for Mexican travelers because of the ease of travel across the border and the availability of direct flights to destinations such as Las Vegas. As the Hispanic population has greatly increased in the U.S., destinations are usually able to accommodate Spanish-speaking visitors

making language less of a travel deterrent. More and more Mexican families are looking to U.S. destinations for family vacations that will provide new and unique experiences. Heavy competition makes pricing and value very important.

Scandinavia. The Scandinavian countries of Sweden, Norway and Denmark currently represent a small but growing market to the U.S. As Utah receives increased attention from the 2002 Olympic Winter Games, it is expected that visitation from Scandinavian countries will increase. Many of the winter sports featured in the Olympics are popular among residents in Norway, Sweden and Denmark. Scandinavian countries are technologically advanced and are among the most stable in Europe in terms of economic growth, unemployment and inflation.

Switzerland. With the highest per-capita income in the world, the Swiss travel market is remarkably resilient to currency fluctuations and has remained a steady international market for Utah, with estimated annual arrivals of over 20,000. English is widely understood, eliminating language barriers and permitting Swiss visitors to travel independently and often “off the beaten path.” Swiss travelers are willing to spend, with one of the highest average daily expenditures (\$116 per visitor per day) of any international market. Swiss travel patterns are similar to Italians, and the average stay in Utah lasts 2.5 nights.

Taiwan. The Taiwan travel market is buoyed by the interaction of Taiwan and U.S. businesses. The familiarity of many business people with traveling to the U.S. carries over into the leisure travel market. Taiwanese youth have a fascination with American culture and in particular with things Western. The large Western cities and national parks generate a great deal of interest within the Taiwan market. Taiwan is also among the top overseas markets to Las Vegas. Taiwan’s economy was better equipped than many Asian countries to withstand the effects of the Asian economic crisis in 1998. Consequently, recovery has been swift and although international travel declined in 1998, the last two years have seen growth in outbound travel to the U.S.

APPENDIX

- **Profile of all Overseas Visitors to Utah**
- **Profile of Overseas Visitors to Utah National Parks**
- **Profile of Overseas Visitors to Salt Lake City**
- **Profile of all Overseas Visitors to Las Vegas**

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	42.2
18-34 Years	34%
35-54 Years	48%
55+ Years	18%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$72,800
< \$40,000	27%
\$40,000 - \$80,000	39%
\$80,000 - \$120,000	19%
\$120,000+	15%

PARTY COMPOSITION

Avg. Travel Party (mean)	1.9
Spouse	37%
Family/Relatives	34%
Traveling Alone	21%
Friends	15%
Business Associates	6%
Group Tour	5%
Adults Only	90%
Adults and Children	10%

GENDER

Men	68%
Women	32%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	68%
U.S. Trips last 12 Months	1.6
U.S. Trips last 5 Years	4.0
1 Trip	41%
2 - 5 Trips	41%
5+ Trips	18%

ORIGIN MARKETS (1999 only)

Germany	23%
France	16%
U.K.	11%
Benelux	10%
Japan	8%
Italy	6%
Switzerland	5%
Oceania	4%
Scandinavia	3%
South America	3%

PORT OF ENTRY

Los Angeles	26%
San Francisco	15%
New York	10%
Chicago	8%
Detroit	4%
Cincinnati	4%

TRAVEL PATTERNS

ADVANCE TRIP PLANNING

Advance Trip Decision	120 Days
Advance Air Reservations	77 Days
Use of Pre-Booked Lodging	66%

USE OF PACKAGES

YES	30%
Air/Lodging	18%
Guided Tour	15%
Air/Rental Car	12%
Air/Lodging/Tour	9%
Air/Lodging/Rental Car	8%
Air/Lodging/Bus	7%
Air/Lodging/Bus/Tour	6%
Advance Package Booking	93 Days
# of Nights Pre-paid as Part of a Package	12.8

INFORMATION SOURCES

Travel Agency	65%
Travel Guides	25%
Friends/Relatives	24%
State/City Travel Office	15%
Personal Computer	12%
Airlines Directly	11%
Tour Company	9%
Newspapers/Magazines	9%
Other	10%

EXPENDITURES

Avg. Spending Per-Visitor-	
Per-Day (mean)	\$81

ACCOMMODATIONS

Hotel/Motel	76%
Private Home	13%
Other	14%

TRANSPORTATION IN U.S.

Rented Auto	58%
Airlines in U.S.	40%
Taxi/Cab/Limousine	27%
Company or Private Auto	23%
City Subway/Tram/Bus	17%

LENGTH OF STAY

# of Nights In Utah (mean)	5.7
# of Nights in US (mean)	23.5

UTAH DESTINATIONS VISITED

Salt Lake City	32%
Bryce Canyon N.P.	25%
Zion N.P.	13%
Monument Valley	12%
Glen Canyon	5%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	81%
Leisure/Rec./Holidays	70%
Visit Friends/Relatives	10%
Other	1%
Business & Convention	19%
Business/Professional	13%
Convention/Conference	5%
Study/Teaching	2%

OTHER DESTINATIONS VISITED

# of States Visited	3.8
# of Destinations Visited	5.3
California	70%
San Francisco	42%
Los Angeles	40%
Yosemite N.P.	13%
San Diego	11%
Nevada	58%
Las Vegas	53%
Arizona	55%
Grand Canyon N.P.	32%
Phoenix	10%
Colorado	12%
Wyoming	12%
Yellowstone N.P.	9%

LEISURE ACTIVITIES

Shopping	86%
Dining in Restaurants	81%
Visit National Parks	78%
Sightseeing in Cities	58%
Visit Historic Places	55%
Touring Countryside	54%
Visit Small Towns	51%
Amusement/Theme Parks	46%
Casinos/Gambling	45%
Cultural or Heritage Sites	38%
Visit Am. Indian Comm.	32%
Guided Tours	26%
Art Gallery/Museum	24%
Water Sports/Sunbathing	22%
Camping/Hiking	21%
Concert/Play/Musical	13%
Environ./Eco Excursions	11%
Nightclubs/Dancing	9%
Attend Sports Event	7%
Snow Skiing	6%
Golfing/Tennis	5%
Cruises	4%
Ranch Vacations	2%
Hunting/Fishing	2%

VISITATION VOLUME (1999 only)

Total Int'l. Visitation (000s)	700
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*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*

Overseas Travelers who visit National Parks (40% of all Overseas Travelers to Utah)

DEMOGRAPHICS

AGE (years)

Average Age (mean)	42.1
18-34 Years	36%
35-54 Years	46%
55+ Years	19%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$66,500
< \$40,000	30%
\$40,000 - \$80,000	41%
\$80,000 - \$120,000	18%
\$120,000+	11%

PARTY COMPOSITION

Avg. Travel Party (mean)	2.2
Spouse	44%
Family/Relatives	36%
Friends	19%
Traveling Alone	12%
Group Tour	7%
Business Associates	2%
Adults Only	88%
Adults and Children	12%

GENDER

Men	66%
Women	35%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	61%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	2.7
1 Trip	48%
2 - 5 Trips	41%
5+ Trips	11%

ORIGIN MARKETS (1999 only)

Germany	26%
France	21%
U.K.	12%
Italy	8%
Benelux	8%
Japan	8%
Switzerland	6%
Oceania	2%

PORT OF ENTRY

Los Angeles	29%
San Francisco	17%
Chicago	8%
Detroit	7%
New York	6%

VISITATION VOLUME (1999 only)

Total Int'l. Visitation (000s)	283
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TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	133 Days
Advance Air Reservations	91 Days
Use of Pre-Booked Lodging	68%

USE OF PACKAGES

YES	40%
Air/Lodging	28%
Guided Tour	20%
Air/Rental Car	18%
Air/Lodging/Tour	14%
Air/Lodging/Rental Car	13%
Air/Lodging/Bus	10%
Air/Lodging/Bus/Tour	9%
Advance Package Booking	90 Days
# of Nights Pre-paid as Part of a Package	13.3

INFORMATION SOURCES

Travel Agency	65%
Travel Guides	31%
Friends/Relatives	26%
State/City Travel Office	20%
Personal Computer	13%
Newspapers/Magazines	12%
Tour Company	11%
Airlines Directly	7%
Other	8%

EXPENDITURES

Avg. Spending Per-Visitor-Per-Day (mean)	\$73
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ACCOMMODATIONS

Hotel/Motel	80%
Private Home	1%
Other	21%

TRANSPORTATION IN U.S.

Rented Auto	65%
Airlines in U.S.	30%
Taxi/Cab/Limousine	22%
City Subway/Tram/Bus	19%
Company or Private Auto	15%

LENGTH OF STAY

# of Nights In Utah (mean)	3.7
# of Nights in US (mean)	20.6

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	63%
Zion N.P.	32%
Monument Valley	30%
Glen Canyon	12%
Salt Lake City	4%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	93%
Leisure/Rec./Holidays	88%
Visit Friends/Relatives	5%
Business & Convention	7%
Business/Professional	3%
Convention/Conference	4%
Study/Teaching	1%

OTHER DESTINATIONS VISITED

# of States Visited	3.9
# of Destinations Visited	6.3
California	83%
San Francisco	56%
Los Angeles	51%
Yosemite N.P.	28%
San Diego	14%
Death Valley N.P.	10%
Arizona	81%
Grand Canyon N.P.	65%
Phoenix	14%
Nevada	74%
Las Vegas	74%
Wyoming	10%
Yellowstone N.P.	9%
Colorado	9%
New York	7%
New York City	7%

LEISURE ACTIVITIES

Visit National Parks	92%
Shopping	85%
Dining in Restaurants	79%
Sightseeing in Cities	59%
Visit Historic Places	58%
Touring Countryside	58%
Visit Small Towns	54%
Casinos/Gambling	53%
Amusement/Theme Parks	49%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	38%
Guided Tours	30%
Camping/Hiking	27%
Art Gallery/Museum	24%
Water Sports/Sunbathing	22%
Environ./Eco Excursions	15%
Ethnic Heritage Sites	13%
Concert/Play/Musical	8%
Nightclubs/Dancing	6%
Attend Sports Event	4%
Cruises	4%
Ranch Vacations	3%
Golfing/Tennis	2%
Hunting/Fishing	1%
Snow Skiing	1%

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*

Overseas Travelers who Visit Salt Lake City (32% of all Overseas Travelers to Utah)

DEMOGRAPHICS

AGE (years)

Average Age (mean)	42.0
18-34 Years	34%
35-54 Years	50%
55+ Years	16%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$80,400
< \$40,000	25%
\$40,000 - \$80,000	35%
\$80,000 - \$120,000	21%
\$120,000+	19%

PARTY COMPOSITION

Avg. Travel Party (mean)	1.6
Traveling Alone	36%
Spouse	24%
Family/Relatives	23%
Business Associates	12%
Friends	11%
Group Tour	4%
Adults Only	95%
Adults and Children	6%

GENDER

Men	74%
Women	26%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	66%
U.S. Trips last 12 Months	2.1
U.S. Trips last 5 Years	5.7
1 Trip	28%
2 - 5 Trips	40%
5+ Trips	32%

ORIGIN MARKETS (1999 only)

Germany	15%
Japan	14%
U.K.	12%
Oceania	7%
Benelux	6%
France	6%
South America	6%
Scandinavia	6%
Switzerland	5%
Italy	4%

PORT OF ENTRY

Los Angeles	21%
San Francisco	12%
New York	11%
Chicago	8%
Cincinnati	7%
Atlanta and Miami (each)	6%

TRAVEL PATTERNS

ADVANCE TRIP PLANNING

Advance Trip Decision	95 Days
Advance Air Reservations	57 Days
Use of Pre-Booked Lodging	65%

USE OF PACKAGES

YES	18%
Guided Tour	10%
Air/Lodging	8%
Air/Rental Car	6%
Air/Lodging/Tour	5%
Air/Lodging/Bus	3%
Air/Lodging/Bus/Tour	3%
Air/Lodging/Rental Car	2%
Advance Package Booking	79 Days
# of Nights Pre-paid as Part of a Package	11.7

INFORMATION SOURCES

Travel Agency	66%
Friends/Relatives	20%
Travel Guides	15%
Airlines Directly	13%
Personal Computer	11%
State/City Travel Office	10%
Tour Company	9%
Corporate Travel Dept.	8%
Newspaper/Magazine	6%
Other	4%

EXPENDITURES

Avg. Spending Per-Visitor-Per-Day (mean)	\$107
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ACCOMMODATIONS

Hotel/Motel	71%
Private Home	27%
Other	8%

TRANSPORTATION IN U.S.

Rented Auto	49%
Airlines in U.S.	49%
Taxi/Cab/Limousine	37%
Company or Private Auto	34%
City Subway/Tram/Bus	15%

LENGTH OF STAY

# of Nights In Utah (mean)	7.5
# of Nights in US (mean)	22.4

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	3%
Monument Valley	2%
Zion N.P.	1%
Glen Canyon	0%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	62%
Leisure/Rec./Holidays	44%
Visit Friends/Relatives	17%
Other	1%
Business & Convention	38%
Business/Professional	28%
Convention/Conference	8%
Study/Teaching	3%

OTHER DESTINATIONS VISITED

# of States Visited	3.3
# of Destinations Visited	4.1
California	48%
Los Angeles	26%
San Francisco	24%
Nevada	31%
Las Vegas	29%
Wyoming	18%
Yellowstone N.P.	13%
Arizona	16%
New York	14%
New York City	13%
Colorado	11%
Denver	9%
Florida	10%

LEISURE ACTIVITIES

Shopping	86%
Dining in Restaurants	83%
Visit National Parks	55%
Sightseeing in Cities	50%
Visit Historic Places	48%
Touring Countryside	42%
Visit Small Towns	38%
Amusement/Theme Parks	34%
Cultural or Heritage Sites	29%
Casinos/Gambling	28%
Concert/Play/Musical	28%
Art Gallery/Museum	21%
Guided Tours	17%
Visit Am. Indian Comm.	17%
Water Sports/Sunbathing	16%
Snow Skiing	13%
Nightclubs/Dancing	12%
Camping/Hiking	9%
Attend Sports Event	9%
Golfing/Tennis	8%
Environ./Eco Excursions	5%
Cruises	4%
Hunting/Fishing	3%
Ranch Vacations	2%

VISITATION VOLUME (1999 only)

Total Int'l. Visitation (000s)	700
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*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

OVERSEAS VISITORS TO LAS VEGAS SUMMARY - 1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	40.3
18-34 Years	39%
35-54 Years	45%
55+ Years	15%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$73,600
< \$40,000	28%
\$40,000 - \$80,000	37%
\$80,000 - \$120,000	19%
\$120,000+	15%

PARTY COMPOSITION

Avg. Travel Party (mean)	2.0
Spouse	36%
Family/Relatives	29%
Traveling Alone	19%
Friends	18%
Business Associates	10%
Group Tour	6%
Adults Only	92%
Adults and Children	8%

GENDER

Men	67%
Women	33%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	67%
U.S. Trips last 12 Months	1.6
U.S. Trips last 5 Years	4.6
1 Trip	40%
2 - 5 Trips	38%
5+ Trips	22%

ORIGIN MARKETS

Japan	23%
U.K.	15%
Germany	11%
France	7%
Oceania	5%
South America	5%
Benelux	4%
Taiwan	4%
Italy	4%
South Korea	3%

PORT OF ENTRY

Los Angeles	36%
San Francisco	13%
New York	8%
Chicago	5%
Miami	4%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	89 Days
Advance Air Reservations	55 Days
Use of Pre-Booked Lodging	71%

USE OF PACKAGES

YES	35%
Air/Lodging	24%
Guided Tour	21%
Air/Lodging/Tour	14%
Air/Lodging/Bus	10%
Air/Lodging/Bus/Tour	8%
Air/Rental Car	7%
Air/Lodging/Rental Car	4%
Advance Package Booking	71 Days
# of Nights Pre-paid as Part of a Package	9.1

INFORMATION SOURCES

Travel Agency	64%
Friends/Relatives	20%
Travel Guides	16%
Personal Computer	15%
Tour Company	14%
Airlines Directly	12%
Newspapers/Magazines	10%
State/City Travel Office	7%
Other	10%

EXPENDITURES

Avg. Spending Per-Visitor-Per-Day (mean)	\$110
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ACCOMMODATIONS

Hotel/Motel	96%
Private Home	3%
Other	1%

TRANSPORTATION IN U.S.

Airlines in U.S.	50%
Rented Auto	41%
Taxi/Cab/Limousine	41%
Company or Private Auto	24%
City Subway/Tram/Bus	22%

LENGTH OF STAY

# of Nights In LV (mean)	3.7
# of Nights in US (mean)	17.3

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	4%
Zion N.P.	2%
Monument Valley	2%
Salt Lake City	2%
Glen Canyon	1%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	80%
Leisure/Rec./Holidays	70%
Visit Friends/Relatives	10%
Business & Convention	20%
Business/Professional	11%
Convention/Conference	8%
Study/Teaching	2%

OTHER DESTINATIONS VISITED

# of States Visited	2.7
# of Destinations Visited	3.9
California	75%
Los Angeles	57%
San Francisco	42%
San Diego	14%
Anaheim	7%
Yosemite N.P.	7%
Arizona	24%
Grand Canyon N.P.	14%
Phoenix	6%
New York	14%
New York City	13%
Utah	10%
Florida	8%

LEISURE ACTIVITIES

Shopping	90%
Dining in Restaurants	85%
Casinos/Gambling	74%
Sightseeing in Cities	62%
Amusement/Theme Parks	61%
Visit National Parks	52%
Visit Historic Places	42%
Visit Small Towns	39%
Touring Countryside	36%
Guided Tours	34%
Cultural or Heritage Sites	25%
Water Sports/Sunbathing	20%
Concert/Play/Musical	19%
Art Gallery/Museum	17%
Nightclubs/Dancing	15%
Visit Am. Indian Comm.	14%
Cruises	7%
Golfing/Tennis	7%
Ethnic Heritage Sites	7%
Attend Sports Event	6%
Camping/Hiking	6%
Environ./Eco Excursions	4%
Snow Skiing	2%
Ranch Vacations	2%
Hunting/Fishing	1%

VISITATION VOLUME

Total Int'l. Visitation (000s)	2,251
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*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries